

UNITED STATES HOUSE OF REPRESENTATIVES**FINANCIAL DISCLOSURE STATEMENT****FORM B**

For New Members, Candidates, and New Employees

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LEGISLATIVE RESOURCE CENTER

18 APR 25 PM 12:59

Name: David Callahan

Daytime Telephone.

FILER STATUS	<input checked="" type="checkbox"/> New Member of or Candidate for U.S. House of Representatives	State: <u>CA</u>	District: <u>13th</u>
	<input type="checkbox"/> Candidates – Date of Election: <u>MAY 22, 2018 DEM</u>	<input type="checkbox"/> Check if Amendment	
<input type="checkbox"/> New Officer or Employee	Staff Filer Type (If Applicable): <input type="checkbox"/> Shared <input type="checkbox"/> Principal Assistant		
Employing Office: _____	Period Covered: January 1, 2018 to <u>MARCH 31</u>		

(Signature)
OFFICE OF THE CLERK
U.S. HOUSE OF REPRESENTATIVES
(Office Use Only)

A \$200 penalty shall be assessed against any individual who files more than 30 days late.

PRELIMINARY INFORMATION – ANSWER EACH OF THESE QUESTIONS

A. Did you, your spouse, or your dependent child: a. Own any reportable asset that was worth more than \$1,000 at the end of the reporting period? <input checked="" type="checkbox"/>	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	E. Did you hold any reportable positions during the reporting period or in the current calendar year up through the date of filing? <input checked="" type="checkbox"/> Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
C. Did you or your spouse have "earned" income (e.g., salaries, honoraria, or pension/IRA distributions) of \$200 or more during the reporting period?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	F. Did you have any reportable agreement or arrangement with an outside entity during the reporting period or in the current calendar year up through the date of filing? <input type="checkbox"/> Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
D. Did you, your spouse, or your dependent child have any reportable liability (more than \$10,000) at any point during the reporting period?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>	J. Did you receive compensation of more than \$5,000 from a single source in the current year and two prior years? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>

ATTACH THE CORRESPONDING SCHEDULE IF YOU ANSWER "YES"

THIS FORM INCLUDES ONLY THE SCHEDULES THAT YOU ARE REQUIRED TO COMPLETE

EXCLUSION OF SPOUSE, DEPENDENT, OR TRUST INFORMATION - ANSWER BOTH OF THESE QUESTIONS

TRUSTS – Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "exempted trusts" need not be disclosed. Have you excluded from this report details of such a trust that benefits you, your spouse, or dependent child? Yes No

EXEMPTION – Have you excluded from this report any other assets, "unearned" income, or liabilities of a spouse or dependent child because they meet all three tests for exemption? Do not answer "yes" unless you have first consulted with the Committee on Ethics. Yes No

SCHEDULE A – ASSETS & “UNEARNED INCOME”

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BLOCK A		BLOCK B		BLOCK C		BLOCK D	
Assets and/or Income Sources		Value of Asset		Type of Income		Amount of Income	
<p>Identity (a) each asset held for investment or exceeding \$1,000 at the end of the reporting period, specify the method used.</p> <p>and (b) any other reportable asset or source of income which generated more than \$200 in “unearned” income during the year.</p> <p>Provide complete names of stocks and mutual funds (do not use only ticker symbols).</p>		<p>Indicate value of asset at close of the reporting period. If you use a valuation method other than fair market value, please specify the method used.</p> <p>If an asset was sold during the reporting period and is the “tax-deferred” column, you may check “401(k), IRA, or 529 accounts”, you may check “Dividends, interest, and capital gains, even if reinvested, must be disclosed as income for assets held in taxable accounts. Check “None” if no income was earned or generated.</p> <p>“Column M is for assets held by your spouse or dependent child in which you have no interest.</p>		<p>For all bank and other cash accounts, total the amount in all interest-bearing accounts, if the total is over \$5,000, list every financial institution where there is more than \$1,000 in interest-bearing accounts.</p> <p>For rental and other real property held for investment, provide a complete address or description, e.g., “rental property,” and a city and state.</p>		<p>Check all columns that apply. For accounts that generate tax-deferred income (such as 401(k), IRA, or 529 accounts), you may check “Dividends, interest, and capital gains, even if reinvested, must be disclosed as income for assets held in taxable accounts. Check “None” if no income was earned or generated.</p> <p>“Column N is for assets held by your spouse or dependent child in which you have no interest.</p>	
Sp. DC. Examps:	ELF Mega Corp Stock Simon & Schuster ABC Hedge Fund	A B C D E F G H I J K L M	A B C D E F G H I J K L M	I II III IV V VI VII VIII IX X XI XII	I II III IV V VI VII VIII IX X XI XII	I II III IV V VI VII VIII IX X XI XII	I II III IV V VI VII VIII IX X XI XII
<p>Excluded: Your personal residence, including second homes and vacation homes (unless there was rental income during the reporting period); and any financial interest in, or income derived from, a federal retirement program, including the Thrift Savings Plan.</p> <p>If you have a privately-traded fund that is an Exempt Investment Fund, please check the “ELF” box.</p> <p>If you so choose, you may indicate that an asset or income source is that of your spouse (SP) or dependent child (DC), or jointly held with anyone (JT), in the optional column on the far left.</p> <p>For detailed discussion of Schedule A requirements, please refer to the instruction booklet.</p>		<p>None</p> <p>\$1-\$1,000</p> <p>\$1,001-\$15,000</p> <p>\$15,001-\$50,000</p> <p>\$50,001-\$100,000</p> <p>\$100,001-\$250,000</p> <p>\$250,001-\$500,000</p> <p>\$500,001-\$1,000,000</p> <p>\$1,000,001-\$5,000,000</p> <p>\$5,000,001-\$25,000,000</p> <p>\$25,000,001-\$50,000,000</p> <p>Over \$50,000,000</p> <p>Spouse/DC Asset over \$1,000,000*</p>		<p>NONE</p> <p>DIVIDENDS</p> <p>RENT</p> <p>INTEREST</p> <p>CAPITAL GAINS</p> <p>EXCEPTED/BLIND TRUST</p> <p>TAX-DEFERRED</p>		<p>Other Type of Income (Specify: e.g., Partnership Income or Farm Income)</p> <p>None</p> <p>\$1-\$200</p> <p>\$201-\$1,000</p> <p>\$1,001-\$2,500</p> <p>\$2,501-\$5,000</p> <p>\$5,001-\$15,000</p> <p>\$15,001-\$50,000</p> <p>\$50,001-\$100,000</p> <p>\$100,001-\$1,000,000</p> <p>\$1,000,001-\$5,000,000</p> <p>Over \$5,000,000</p> <p>Spouse/DC Income over \$1,000,000*</p>	
<p>Reynolds, Attwater, Ltd.</p> <p>LSC Communications</p> <p>Dowdell, Firo Solutions</p> <p>Dowdell, Firo, Sons</p>		<p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p>		<p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p>		<p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p>	
<p>Use additional sheets if more space is required.</p>							

SCHEDULE A – ASSETS & “UNEARNED INCOME”

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ASSET NAME	BLOCK A Value of Asset	BLOCK B Type of Income	BLOCK C Amount of Income												BLOCK D Current Year
			A	B	C	D	E	F	G	H	I	J	K	L	
VALUATED HIGH DIV. YTD INDEX FUND	None														
LOAN TO FRIENDS OF INCOME FUND OF AMERICA	\$1,001-\$15,000														
Keed Biz Simolelle	\$50,001-\$100,000														
LINCOLN CHOICE PLUS VARIABLE ANNUITY	\$100,001-\$250,000														
BUISSES LIFE PLUS SINGLE PREM DEF ANN	\$250,001-\$500,000														
Broker's Life of S. B. A.	\$1,000,001-\$5,000,000														
GABELLI UTILITIES FUND	Over \$5,000,000														
INCOME FUND OF AMERICA	Spouse/DC Asset over \$1,000,000*														
	NON														
	DIVIDENDS														
	INTEREST														
	CAPITAL GAINS														
	EXCEPTED/BLIND TRUST														
	INVESTMENT														
	Other Type of Income (Specify: e.g., Partnership Income or Farm Income)														
	NON														
	\$1-\$200														
	\$201-\$500														
	\$1,001-\$2,500														
	\$2,501-\$5,000														
	\$5,001-\$15,000														
	\$16,001-\$50,000														
	\$50,001-\$100,000														
	\$100,001-\$1,000,000														
	\$1,000,001-\$5,000,000														
	Over \$5,000,000														
	Spouse/DC Income over \$1,000,000*														
	NON														
	\$1-\$200														
	\$201-\$500														
	\$1,001-\$2,500														
	\$2,501-\$5,000														
	\$5,001-\$15,000														
	\$16,001-\$50,000														
	\$50,001-\$100,000														
	\$100,001-\$1,000,000														
	\$1,000,001-\$5,000,000														
	Over \$5,000,000														
	Spouse/DC Income over \$1,000,000*														

Use additional sheets if more space is required.

SCHEDULE C – EARNED INCOME

List the source, type, and amount of earned income from any source (other than the filer's current employment by the U.S. government) totaling \$200 or more during the reporting period. For both the filer and spouse, list the source and amount of any bonuses. List only the sources for other bonuses earned income exceeding \$1,000. See examples below.

EXCLUDE: Military pay (such as National Guard or Reserve pay), federal retirement programs, and benefits received under the Social Security Act.

INCOME LIMITS and PROHIBITED INCOME: Be advised that the income limit and prohibited income may apply to you after you are on House payroll. The 2016 limit on outside earned income for Members and employees compensated at or above the "senior staff" rate was \$27,495. The 2017 limit is \$27,765. In addition, certain types of income (notably honoraria, director's fees, and payments for professional services involving a fiduciary relationship) are totally prohibited for Members and senior staff.

Source (include date of receipt for honoraria)

Examples:	State of Maryland Civil War Roundtable (Oct 2)	Ontario County Board of Education	Spouse Salary	Spouse Salary	Salary

Source (include date of receipt for honoraria)	Type	Amount	
		Current Year to Filing	Preceding Year
ABC Trade Association, Baltimore, MD (July 15)	Honorarium	\$0	\$500
State of Maryland	Salary	\$20,000	\$76,000
Civil War Roundtable (Oct. 2)	Spouse Speech	\$0	\$1,000
Ontario County Board of Education	Spouse Salary	N/A	N/A
Enterprise Leasing Company of Georgia	Salary	\$21,864	\$11,822

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Use additional sheets if more space is required.

SCHEDULE D – LIABILITIES

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Report liabilities of over \$10,000 owed to any one creditor at any time during the reporting period by you, your spouse, or your dependent child. Mark the highest amount owed during the reporting period. **New Members:** Members are required to report all liabilities secured by real property including mortgages on their personal residence. **Exclude:** Any mortgage on your personal residence (unless you rent it out or are a Member); loans secured by automobiles, household furniture, or appliances; liabilities of a business in which you own an interest (unless you are personally liable); and liabilities owed to you by a spouse or the child, parent, or sibling of you or your spouse. Report a revolving charge account (i.e., credit card) only if the balance at the close of the reporting period exceeded \$10,000.

*Column K is for liabilities held solely by your spouse or dependent child.

Schedule A (10,000)
Column 1 is for liabilities held solely by your spouse or dependent child.

Creditor SP DC, JT	Date Liability Incurred MO/YR	Type of Liability	Amount of Liability							
			A	B	C	D	E	F	G	H
Example	First Bank of Wilmington, DE	598	Mortgage on Rental Property, Dover, DE		\$10,001- \$15,000					
					\$15,001- \$50,000					
					\$20,001- \$100,000					
					\$100,001- \$250,000					
					\$250,001- \$500,000					
					\$500,001- \$1,000,000					
					\$1,000,001- \$5,000,000					
					\$5,000,001- \$25,000,000					
					\$25,000,001- \$50,000,000					
					Over \$50,000,000					
					Over \$1,000,000* (Spouse/DC Liability)					

SCHEDULE E – POSITIONS

Report all positions, compensated or uncompensated, as an officer, director, trustee of an organization, partner, proprietor, representative, employee, or consultant of any corporation, firm, partnership, or other business enterprise, nonprofit organization, labor organization, or educational or other institution other than the United States. **Exclude:** Positions held in any religious, social, fraternal, or political entities (such as political parties and campaign organizations); and positions solely of an honorary nature. **New Members and second-year candidates** report positions held in the reporting period and the current calendar year. **First-year candidates and new employees** report positions held in the current calendar year and two previous years.

Position	Name of Organization
Proprietor	Keep Biz Simple LLC